

SCOTTISH ACCOMMODATION OCCUPANCY SURVEY REPORT:

March 2023/2022 Report - GUEST HOUSE / B&Bs - Revised

1.0 Introduction March 2023/2022

Welcome to the VisitScotland Scottish Accommodation Occupancy Survey Report covering March 2023 and benchmarking against March 2022. The report reviews Accommodation performance throughout Scotland, highlighting trends across various industry sectors and categories. This report offers a snapshot of accommodation performance based on participating providers. Comments and feedback should be directed to Hugh Sheridan (E-mail: [#hugh.sheridan@gcu.ac.uk](mailto:hugh.sheridan@gcu.ac.uk)).

Please note that this report was revised from a previous version published earlier in the year and therefore any previous versions should be discarded.

2.0 Executive Summary March 2023

The SOAS Report: March 2023/2022 Guest House/B&Bs report showed a significant occupancy increase in the Guest House/B&Bs sector in Scotland when compared to the same period in 2022. Scottish Serviced Accommodation occupancy rates for March 2023 experienced an **12.58** percentage point increase when comparing percentage room occupancy rates with March 2022. Occupancy rates within the Guest House/B&B sector experienced a **34.10** percentage point increase in March 2023 when comparing the same period last year.

Data from the Scottish Retail Consortium showed that Scottish Retail Attractions footfall increased by 14.5% in March 2023 compared to March 2022. Both Edinburgh and Glasgow seeing noticeable increases (27.8% and 16.7% respectively). However, when comparing footfall in March 2023 with March 2019 there remained a 11.1% decrease. This was indicative of the continued pressures on consumer spending and the slower return to urban working for some.

Domestic consumer sentiment provided by the GB National Tourist Boards for March 2023 evidenced similar findings with 49% of respondents undertaking carefully planned purchasing decisions with caution in discretionary leisure expenditure. Notably, some 23% of respondents recorded reducing expenditure with concern expressed in respect of the state of the UK economy. Only, 29% of UK adults intended to take a domestic overnight trip in the second quarter of 2023 although that figure rose to 73% for the following 12 months. These figures have been consistent across the last three waves of the GB National Tourist Survey (VisitBritain 2023) and evidenced the importance attached to holiday expenditure even in such a challenging economic environment.

The recovery in international inbound visitation continues in 2023; however, the reduced availability of flights and routes when compared with 2019 continues to restrain growth. A highlight in air transport was from Scotlands Regional Carrier; Loganair, which saw a year-to-date growth of 29% in daily flights compared to 2019. However, more generally across the sector, Eurocontrol (European Air Traffic Agency) indicated that UK air connectivity had seen a -14% decrease in year-to-date flights compared to 2019.

The United Nations World Tourism Organisations World Tourism Barometer found global international tourist arrivals reached 80% of pre-pandemic levels in the first quarter of 2023 (-20% compared to the same quarter of 2019) boosted by strong results in Europe and the Middle East, compared to a 66% recovery level for the year 2022 overall. An estimated 235 million tourists travelled internationally in the first three months, more than double those in the same period of 2022. Europe reached 90% of pre-pandemic levels in Q1 2023, supported by robust intra-regional demand.

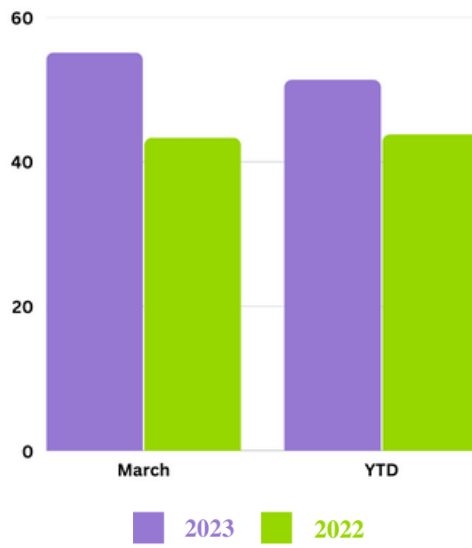
Looking ahead, the UNWTO Panel of Experts survey indicates that almost 70% of experts expect better performance in May-August 2023. Yet, most continue to believe international tourism will not return to 2019 levels until 2024 or later. The UNWTO also suggest strong results are expected in the coming Northern Hemisphere summer season backed by robust pent-up demand, the sustained recovery of air connectivity, and the recent reopening of China and other major Asian markets and destinations.

(Source: <https://www.unwto.org/news/tourism-on-track-for-full-recovery-as-new-data-shows-strong-start-to-2023>)

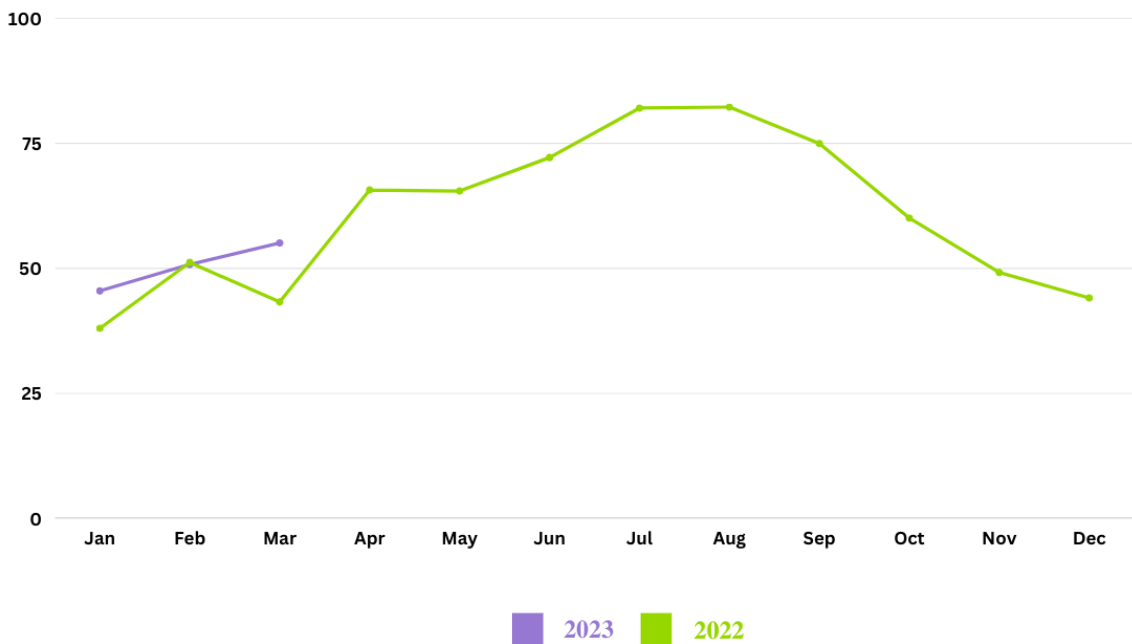
All Serviced Accommodation

Room Occupancy – March 2023/2022

Serviced accommodation Room Occupancy was 55.84% in March 2023. This shows an 12.58 percentage point increase when compared with March 2022.



Room Occupancy – Year to Date

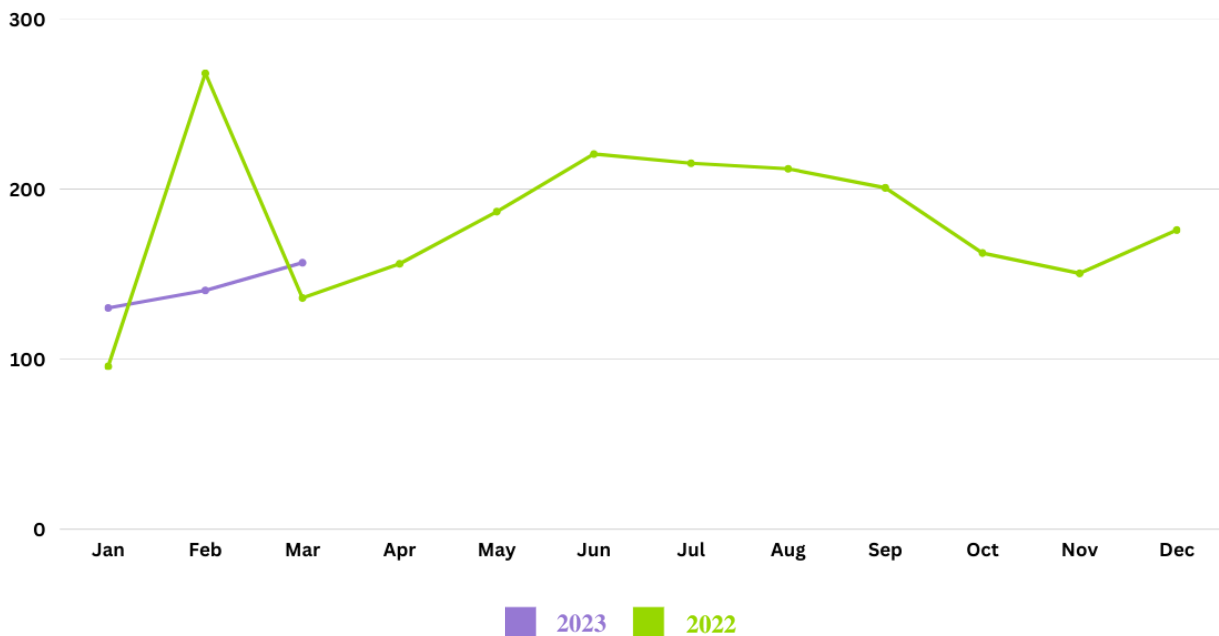


In 2022, room occupancy reached at peak in August at 82.29%.

Room Occupancy	March 23	March 22	23/22 Diff ¹	Change ²	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	55.84%	43.26%	12.58	113	51.81%	43.78%	8.03	108

Bed Occupancy	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
All Serviced Accommodation	47.53%	47.16%	0.37	100	41.82%	40.02%	1.80	102

The Revenue per available occupied room for March 2023 was **£154.16** compared with **£136.05** in March 2022. This figure is based solely on accommodation providers who provided financial information for either March 2023 and/or 2022.



RevPAR Year to Date 2023/2022

Room – Average RevPAR (£)	March 23	March 22
All Serviced Accommodation	£154.16	£136.05

RevPAR by Grading- March 2023/21

Grading – Average RevPAR (£)	March 23	March 22
2 Stars	£118.34	£93.69
3 Stars	£116.74	£113.54
4 Stars	£204.69	£202.11
5 Stars	£122.14	£99.95

¹ 23/22 Diff throughout this report is expressed by % Point Change

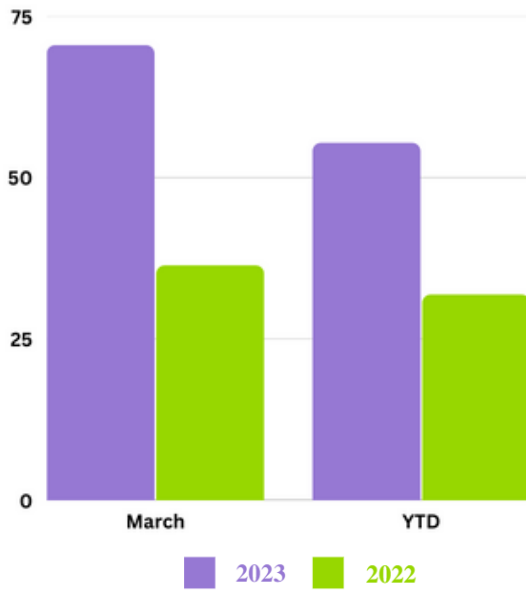
² Change is Expressed by % Index Value; e.g. if the value has a Change increase of 15%, the index is 115; if it has fallen 5%, the index is 95. No change is expressed by 100 Index value.

Unclassified £4.47 £151.36

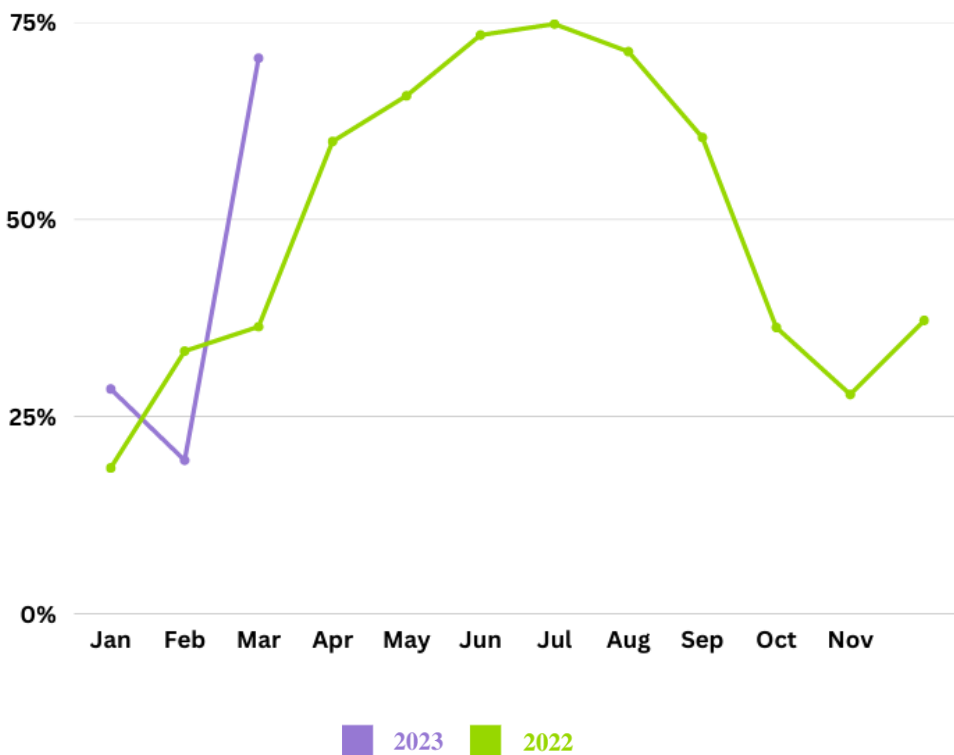
3.0 Serviced Accommodation – Guest House/B&B Sector

3.1 Performance by Guest House/B&B Category

Guest House / B&B Room Occupancy – March 2023/2022



Guest House / B&B Room Occupancy – Year to Date



In the **Guest House/B&B sector**, the room occupancy rate for the period March 2023 was **70.47%** when compared to data from the previous year of **36.37%** occupancy rate; this shows an overall percentage point increase of **34.10**.

The table below shows the **Room Occupancy** rate recorded for March 2023/2022 as well as the 23/22 Diff calculation for the **Guest House/B&B sector**

Room Occupancy	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	70.47%	36.37%	34.10	134	61.06%	31.97%	29.09	129

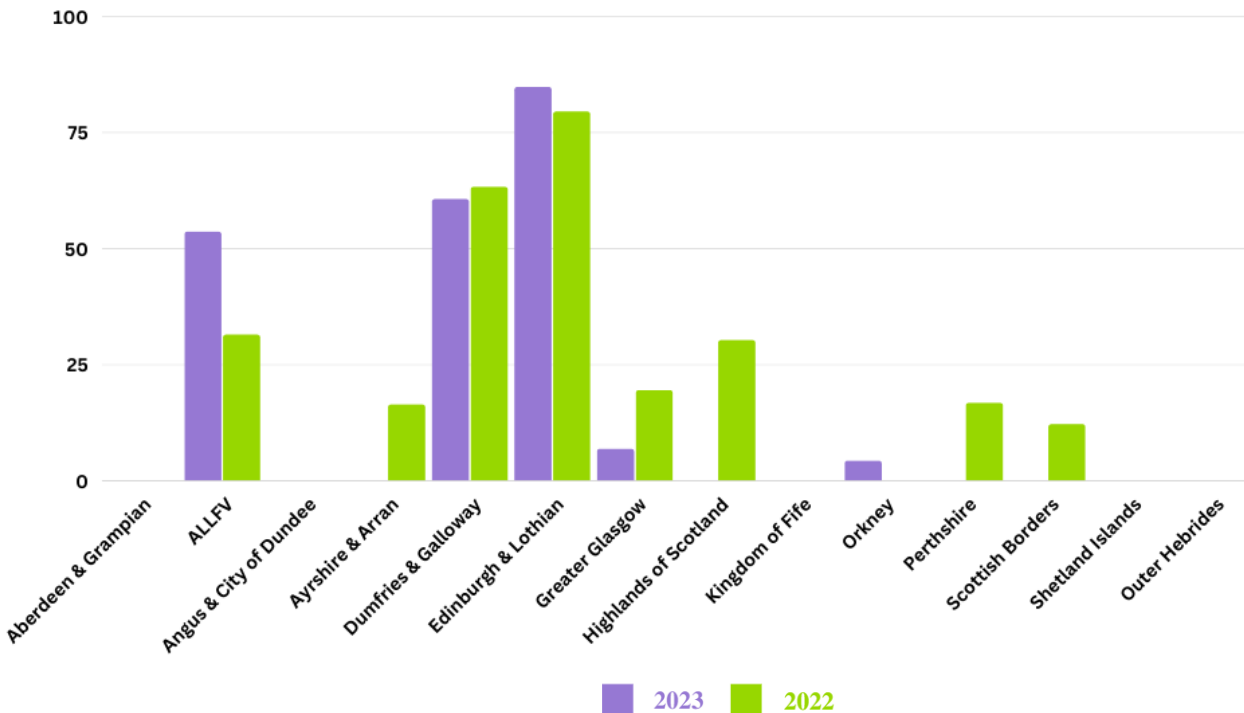
In the **Guest House/B&B sector**, the bed occupancy rate for the period March 2023 was **61.30%** when compared to data from the previous year of **29.63%** occupancy rate; this shows an overall percentage point increase of **31.67**.

The table below shows the **Bed Occupancy** rate recorded for March 2023/2022 as well as the 23/22 Diff calculation for the **Guest House/B&B sector**

Bed Occupancy	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Guest House/B&B	61.30%	29.63%	31.67%	132	46.67%	25.03%	21.64	122

Room Occupancy by Former Visit Scotland Area

Guest House / B&B Room Occupancy by Former VisitScotland Area – March 2023/2022



Percentage room and bed occupancy rates for Guest House/B&Bs in Edinburgh & Lothian were the highest in March 2023 as well as March 2022. Operators in Large Urban Areas, Inland locations and properties charging a tariff of £70 and over fared best in room occupancy rates in March 2023.

Room Occupancy by Former Visit Scotland Area – March 2023/2022

Area	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	-	-	-	-	-	-	-	-
ALLFV	*	*	*	*	*	32.37%	21.26	121
Angus & City of Dundee	-	*	*	*	-	*	0.00	100
Ayrshire & Arran	-	*	*	*	-	*	*	*
Dumfries & Galloway	*	*	*	*	*	52.22%	7.44	107
Edinburgh & Lothian	*	*	*	*	*	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	-	30.18%	-30.18	70	*	26.61%	-26.61	73
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	-	*	*	*	-	*	*	*
Shetland Islands	*	*	*	*	*	*	*	*
Outer Hebrides	-	*	*	*	-	*	*	*

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Bed Occupancy by Former Visit Scotland Area – March 2023/2022

Area	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Aberdeen & Grampian	-	-	-	-	-	-	-	-
ALLFV	*	*	*	*	*	24.96%	28.74	129
Angus & City of Dundee	-	*	*	*	-	*	0.00	100
Ayrshire & Arran	-	*	*	*	-	*	*	*
Dumfries & Galloway	*	*	*	*	*	39.63%	5.80	106
Edinburgh & Lothian	*	*	*	*	*	*	*	*
Greater Glasgow	*	*	*	*	*	*	*	*
Highlands of Scotland	-	21.35%	-21.35	79	*	17.46%	-17.46	83
Kingdom of Fife	-	-	-	-	-	-	-	-
Orkney	*	*	*	*	*	*	*	*
Perthshire	*	*	*	*	*	*	*	*
Scottish Borders	-	*	*	*	-	*	*	*
Shetland Islands	*	*	*	*	*	*	*	*
Outer Hebrides	-	*	*	*	-	*	*	*

- Sample Size = Nil

*Sample Size (between 1 and 4) too small to be included

Room Occupancy by Location (Accessibility & Density) – March 2023/2022

Location accessibility/density	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	*	*	*
Other Urban Areas	*	31.48%	-24.59	75	*	26.30%	-20.88	79
Accessible Small Towns	-	26.99%	-26.99	73	-	24.37%	-24.37	76
Remote Small Towns	*	*	*	*	*	*	*	*
Accessible Rural	*	*	*	*	*	*	*	*

Remote Rural	*	27.89%	-23.73	76	*	28.08%	-23.80	76
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Location (Accessibility & Density) – March 2023/2022

Location accessibility/density	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Large Urban Areas	*	*	*	*	*	*	*	*
Other Urban Areas	*	22.11%	-19.35	81	*	17.04%	-14.63	85
Accessible Small Towns	-	20.33%	-20.33	80	-	18.40%	-18.40	82
Remote Small Towns	*	*	*	*	*	*	*	*
Accessible Rural	*	*	*	*	*	*	*	*
Remote Rural	*	19.98%	-17.90	82	*	17.83%	-15.69	84
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by Location (Geographic) – March 2023/2022

Location (Geographic)	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	28.34%	-21.45	79	*	26.54%	-21.12	79
Inland		76.69%	53.76%	22.93	123	76.53%	43.63%	32.90
Island	*	11.23%	-7.07	93	*	15.98%	-11.70	88
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by Location (Geographic) – March 2023/2022

Location (Geographic)	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
Coastal	*	20.86%	-18.10	82	*	18.79%	-16.38	84
Inland		73.78%	46.27%	27.51	128	73.52%	36.57%	36.95
Island	*	7.59%	-5.51	94	*	9.30%	-7.16	93
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Room Occupancy by size– March 2023/2022

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	36.41%	-30.34	70	5.07%	25.74%	-20.67%	79
4 to 10	*	34.42%	35.07	135	69.33%	28.91%	40.42%	140
11 to 25	*	*	*	*	*	52.73%	47.27	147
26 to 50	-	-	-	-	-	-	-	-
51 to 100	-	-	-	-	-	-	-	-
Over 100	-	-	-	-	-	-	-	-
- Sample Size = Nil			*Sample Size (between 1 and 4) too small to be included					

Bed Occupancy by size – March 2023/2022

Size	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
1 to 3	*	19.78%	-17.20	83	2.34%	18.49%	-16.15%	84
4 to 10	*	24.97%	26.65	127	51.51%	20.06%	31.45	131

11 to 25	*	*	*	*	*	47.82%	52.18	152
26 to 50	-	-	-	-	-	-	-	-
51 to 100	-	-	-	-	-	-	-	-
Over 100	-	-	-	-	-	-	-	-
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by tariff – March 2023/2022

Tariff	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	*	*	*	*	*	16.67%	-16.67	83
£40 - £49.99	*	19.72%	-12.83	87	*	14.31%	-8.89	91
£50 - £59.99	-	*	*	*	*	21.40%	-21.40	79
£60 - £69.99	*	*	*	*	*	26.78%	32.88	133
£70 +	*	41.49%	34.22	134	71.78%	37.83%	33.95	134
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by tariff – March 2023/2022

Tariff	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
£20 - £29.99	-	*	*	*	-	*	*	*
£30 - £39.99	*	*	*	*	*	12.50%	-12.50	88
£40 - £49.99	*	11.11%	-8.35	92	*	7.59%	-5.18	95
£50 - £59.99	-	*	*	*	*	14.35%	-14.35	86
£60 - £69.99	*	*	*	*	*	19.64%	25.79	126
£70 +	*	35.71%	38.05	138	66.45%	31.16%	35.29	135
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Room Occupancy by grading – March 2023/2022

Grading	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	34.95%	9.65	110	30.82%	29.43%	1.39	101
4 Stars	*	26.00%	-19.11	81	*	18.78%	-13.36	87
5 Stars	-	-	-	-	-	-	-	-
Unclassified	*	46.73%	6.90	107	*	33.49%	20.14	120
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

Bed Occupancy by grading – March 2023/2022

Grading	March 23	March 22	23/22 Diff	Change	YTD 23	YTD 22	23/22 Diff	Change
2 Stars	-	-	-	-	-	-	-	-
3 Stars	*	26.42%	18.18	118	22.88%	20.70%	2.18	102
4 Stars	*	17.95%	-11.06	89	*	11.99%	-9.58	90
5 Stars	-	-	-	-	-	-	-	-
Unclassified	*	0.00%	53.63	154	*	21.81%	31.89	132
- Sample Size = Nil		*Sample Size (between 1 and 4) too small to be included						

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